

## **Job Description**

**Job Title:** Finance Business Partner  
**Reports to:** Senior Finance Business Partner

### **Purpose**

We need an experienced and dedicated Finance Business Partner to provide high quality and timely financial information and analysis to Shaw Trust's managers and external stakeholders in a complex group environment. You will be working as part of a wider team 12 colleagues delivering accurate, efficient and insightful financial management support services to the Charity.

We need a customer focused individual who will is able to use their commercial acumen to ensure service quality is maximised and organisational financial performance targets are achieved.

We need someone who is comfortable working remotely and developing excellent working relations with managers in a large (£200m+) turnover dispersed organisation.

### **Main Duties and Responsibilities**

1. To engage with senior divisional colleagues to ensure fit for purpose business plans and agreed divisional financial targets are achieved in the short and medium term.
2. To work with Senior Finance Business Partners to identify where risks and opportunities exist that could impact on the delivery of business plan objectives and financial targets. Propose actions to mitigate the impact of risks and support innovations to maximise opportunities.
3. To work with Senior Finance Business Partners to look across divisional boundaries to identify where synergies can be achieved that will create efficiencies across the Shaw Trust Group.
4. To interpret and present financial and non-financial analysis to senior divisional managers to ensure the financial impact of operational activities is planned, understood and evaluated in relation to agreed budgets and agreed financial forecasts.

5. To support divisional managers to plan and implement effective management action to secure performance improvements where cost centres are under performing to budget and / or forecast.
6. To provide finance input as part of the assessment, development, costing, pricing, evaluation and submission of new opportunities.
7. To represent the finance team at internal and external meetings, including meetings with commissioners, partners and other key stakeholders.
8. To provide a monthly summary of key variances in budget, actual and forecast and key KPI variances for consolidation within the Board of Trustees Finance Report and provide information as required to sub committees and advisory boards.
9. To support and where appropriate lead the annual divisional budget setting process and to lead the production of regular annual forecasts.
10. To contribute towards the year end accounts closedown timetable and to support the production of the annual report and accounts, including liaison with external auditors.
11. To produce accurate external financial returns to commissioners and funders in accordance with contract requirements and externally imposed deadlines. Dealing with queries that relate to returns made or returns to be made.
12. To drive continuous improvements in the department's processes and procedure including identifying opportunities to streamline and automate existing administrative procedures and tasks and to ensure that there is a strong system of internal financial control.
13. To take a lead role in ensuring that financial literacy across the Trust is improved. To liaise with HR department to ensure that the financial training provided to new staff through the induction programme is relevant and useful. To provide financial training and development to non-finance staff within the Trust. To construct specific training events that are responsive to business needs.
14. Responsible for ensuring the financial implications of all new policies and procedures are correctly interpreted and implemented, using highly developed specialist knowledge and experience thereby minimising financial risk to the Trust. Identifying and developing new procedures when required.
15. To develop a 'learning culture' within the team, supporting individual development and encouraging cross-cover and cross-learning across the teams. Responsible for the continual development and training of finance staff ensuring that they provide a professional service of the highest standard. Identifying training needs

to support the delivery of a high quality service through regular 1 to 1 meetings and appraisals.

16. To fully engage with the business to ensure that the Finance Department is able to provide good customer service that is responsive to the needs of the business.
17. To work closely with the Shaw Trust Transactions Team to ensure that the Finance Department provides a cohesive and “joined up” service to the wider business.

## Other

1. To undertake any further training as identified in the Shaw Trust review procedures.
2. Ensure that safe working practices are followed in respect of COSHH and other Risk Assessment control measures.
3. Employees must comply with the provisions of ‘The Health and Safety at Work Act 1974’ and must take reasonable care for the health and safety of themselves and of other persons who may be affected by their acts of omissions whilst at work. Employees are also required to co-operate with their employer to enable them to perform or comply with any statutory provisions. The Trust’s efforts to promote a safe and healthy working environment can only succeed with the full co-operation of its employees.
4. To understand, comply with and promote Shaw Trust’s safeguarding policy and procedures. It is the responsibility of all employees to make the working environment safe and secure for all. Everyone must adhere to the 5 Rs in relation to possible abuse: Recognition, Response, Reporting, Recording and Referral. The Trust can only ensure its dedication to the protection of vulnerable people with the full cooperation of its employees.
5. The Trust has a Diversity and Inclusion Policy and it is the responsibility of all staff to comply with this. The key responsibilities for staff under this Policy are set out in the Trust Code of Conduct.
6. To maintain the confidentiality about clients, staff and other Trust business. The work is of a confidential nature and information gained must not be communicated to other persons except in the recognised course of duty. The post holder must meet the requirements of the Data Protection Act at all times.
7. To maintain awareness of risk and to take personal responsibility for ensuring that the Trust is not unnecessarily exposed to risk. To report any issues or

concerns relating to risk and the effectiveness of the Trust 's risk management arrangements.

8. Be aware of, promote and implement Shaw Trust's Risk, Quality and Information Security Management Systems.
9. To report to line manager, or other appropriate person, in the event of awareness of bad practice.
10. Recycle and manage energy within your environment in line with Shaw Trust's Strategic aim to adopt green approaches and become carbon neutral.

This job description is intended to provide a broad outline of the main duties and responsibilities only. The post holder will need to be flexible in developing the role in conjunction with the line manager. The post holder may be asked to carry out any other delegated duty or task that is in line with their post.

<p align="center"><b>Person Specification</b></p> <p align="center"><b>Job Title:</b></p> <p align="center">(E=Essential D=Desirable)</p>
<p><b>SKILLS AND CORE COMPETENCIES</b></p>
<p><b>Technical competency (qualifications and training)</b></p> <ul style="list-style-type: none"> <li>• CCAB qualification or sufficient qualification by experience <b>(E)</b></li> <li>• Evidence of Continuing Professional Development <b>(E)</b></li> <li>• Previous experience of working with Agresso Business World <b>(D)</b></li> </ul>
<p><b>Experience</b></p> <ul style="list-style-type: none"> <li>• Relevant post qualification experience in a mid to senior level financial management role in a similar-sized organisation <b>(E)</b></li> <li>• Relevant experience in the production of monthly management accounts, budgets and forecasts <b>(E)</b></li> <li>• Staff management experience within a customer focussed environment <b>(D)</b></li> <li>• Experience of change management <b>(E)</b></li> <li>• Forward financial planning, costing, and option appraisal <b>(E)</b></li> <li>• Experience of operating across a range of finance functions, including financial services, budgeting, planning, reporting, capital accounting, and supporting budget holders <b>(D)</b></li> <li>• Experience working with, and improving systems and processes <b>(E)</b></li> <li>• High financial awareness, with the ability to communicate complex financial management information in a straight forward way <b>(E)</b></li> </ul>
<p><b>Skills and Attributes</b></p> <ul style="list-style-type: none"> <li>• A good working knowledge of all Microsoft applications, with good working skills in Excel <b>(E)</b></li> <li>• Good, proven, people management skills <b>(E)</b></li> <li>• Ability to build a team, encouraging cross-learning and consistent service delivery <b>(E)</b></li> <li>• Ability both to identify required process improvements and to design and implement those improvements <b>(E)</b></li> <li>• Sift complex financial and non-financial information from a range of available sources to understand its impact on the organisation <b>(E)</b>.</li> <li>• Understand and work through complex issues and identify solutions <b>(E)</b></li> <li>• Work under pressure, meet key deadlines and adapt to a changing environment <b>(E)</b></li> <li>• Work effectively as part of a team <b>(E)</b></li> <li>• Work without supervision and achieve the objectives of the post <b>(E)</b></li> <li>• Identify and prioritise complex, time sensitive workload and projects <b>(E)</b></li> <li>• Motivate a professional team <b>(E)</b></li> </ul>

### **Personal qualities, communicating and relating to others**

- Excellent communications skills, both orally and in writing **(E)**
- Commitment to customer service **(E)**
- Strong persuasion and negotiation skills **(E)**
- Willingness to act as an ambassador for the finance department **(E)**
- Commitment to personal & professional development **(E)**
- A corporate team player – able to focus on the good of the broader organisation, and the clients we serve **(E)**
- Build effective working relationships with colleagues across the Trust **(E)**
- Demonstrate effective negotiating and influencing skills **(E)**

### **Safeguarding**

- Be able to display an awareness, understanding and commitment to the protection and safeguarding of young people and vulnerable adults. **(E)**
- This post requires a disclosure and barring service check at the Basic Level **(E)**

### **Other**

- Have an understanding of and be able to demonstrate a commitment to Equal Opportunities and Diversity. **(E)**
- A desire to work within the Charity Sector **(D)**
- Willingness to travel as necessary **(E)**